LEGALMARKETINGASSOCIATION LMA®

Mid-Atlantic Region

Annual Pre-Conference Recap – Going All In on the Client Experience:

Using Client Journey Mapping to Deliver a Better Client Experience and Drive Revenues on a Small Budget

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This year's LMA Annual Conference theme was "Stretch Beyond, Together." The Solo/Small Team SIG presented a pre-conference program that certainly fit the theme. Firms of all sizes participated in this full-day program, facilitated by **Yolanda Cartusciello**, partner at PP&C Consulting. My co-chair, **Misty Borg Misterek**, and I were thrilled to work with Yolanda as she created a fast-moving session which incorporated:

- A relevant ice-breaker;
- Background on client values;
- What client experience means to law firms and why we need to pay attention to it;
- Summary of client interviews;
- Client journey mapping exercises, including working in small groups with four in-house counsel; and
- A rapid-fire Q&A with the in-house counsel.

The Client Experience

We began the day by answering the question, "What was the last truly memorable client experience you had?" Answers ranged from superior client service on an airline, to issues securing a mortgage, to various restaurant experiences. Some were positive and others were memorable for a different reason, but they all had one thing in common – how we **felt** during and after the experience. We were asked to keep our emotional responses in mind as we put ourselves in our clients' shoes throughout the rest of the day.

Many of us spend a great deal of time and resources on the business development cycle—bringing the client in—but our work in this program focused on what happens after the client signs the engagement letter. The siloed nature of the delivery of legal services focuses on the legal work and billing:

Initial Interactions + Lawyer Meetings + Support Staff Interactions + Technology + Billing =
The Client Experience

Diagnostic tools firms use focus on the firm's performance:

- Client interviews
- Informal client feedback
- Client scorecards
- External quantitative surveys
- Post-transactional and post-litigation reviews

These can all be categorized as client feedback, but none focus on the client's **emotional** experience with the firm. Over the course of conducting hundreds of client interviews, Yolanda reported that the issues that arise regularly have nothing to do with the quality of the legal work. Particularly since the pandemic, clients are looking for:

- Pragmatic business advice
- A deep understanding of their issues and the current marketplace Technological savvy
- Swift turnarounds
- Efficient and cost-effective services
- Unwavering attention to detail

They also expect **relationships** – they are hiring people, not firms. Firms need to do the same – think of clients as people, not companies.

What Is Client Journey Mapping?

Definition: A visual representation of the steps and perceptions a specific client goes through over a period of time to accomplish a specific goal that may include some interactions with your organization.

The map helps to identify how the client views an organization by putting interactions in the context of the client's broader goals, objectives and activities. Maps also help to identify the stages at which problems surfaced and where bright spots occurred, leading to:

- Identifying pain points and deploying client-focused solutions;
- Fostering client-centricity across the organization;
- Uncovering and fulfilling unmet client needs;
- Linking client experiences to desired business outcomes; and
- Retaining and expanding client relationships and increasing referrals.

Journey maps rely on stories, making us relatable, authentic, personable and inspiring.

Working with the In-House Counsel

What made this session particularly unique was the opportunity to work in small groups with four in-house counsel who joined us for the second half of the program. Each counsel told a story to their group about an experience they had working with a law firm. We then developed a client journey map, plotting the client's expectations (desired experience) over what actually happened (existing experience) on a map of the stages of the experience. We identified gaps in the experience and came up with solutions as to how the firm could improve for the next client interaction. The most important part of the exercise was putting ourselves into the client's shoes. When we talked about the experience and solutions, we spoke in the first-person as if we were the client.

Although each matter was different, a few best practices emerged:

- Relationships – get to know me and my business and what keeps me up at night
- Project management – keep me informed along the way (no surprises)
- Anticipate – stay two steps ahead of me and make my job easier
- Set goals, expectations and deadlines (again, no surprises)

No Budget? No Problem.

- Communication is key. Include questions in your intake process that will help you to better understand your clients' service expectations.
- Conduct client interview programs yourself.
- Share client feedback with lawyers and anyone who might interact with clients.
- Lead a client journey exercise with your lawyers. Start with an alum who is a client and ask him/her to tell you a story you can use in the exercise.
- Utilize simple, inexpensive technology, such as deal rooms.
- Focus your pitches and marketing on client needs and use experiences and stories as differentiators.

We, as consumers, have hundreds of positive and negative experiences with companies. If we see our law firm clients as **people**—not as companies or revenue—we can start to see how focusing on their experiences with our firms can create a true competitive advantage.

For more on client experience, read my article, **CX in the Hybrid Workplace: Starting a Program or Staying on Track**, in the Q1 newsletter.

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